

**Sample Individualized Budget Explanation
Dorothy Gale**

1. Need for Attendant Services Based On Assessment and Plan for Independence

- The Assessment and Plan for Independence for Dorothy Gale reflect approximately 35 hours of attendant services per week.

Bathing – 1 hour/day
Dressing – 30 minutes/day
Toileting Assistance – 20 minutes/day
Transferring – 1 ¼ hours/day
Meal preparation – 1 hour/day
TOTAL per day – 4 hours

- 4 hours x 7 days = 28 hours

Laundry – 5 hours/week
Shopping – 2 hours/week
TOTAL – 7 hours/week

- 28 hours/week + 7 hours/week = 35 hours/week

It appears that Dorothy needs approximately 4 hours per day for personal care and meal preparation (28 hours per week) plus an additional 5 hours per week for laundry and 2 hours per week for shopping (total 7 hours) throughout the week.

2. Monthly Allocation

- Dorothy has a monthly allocation of \$2,051.00.

3. Fiscal Management Services (8% monthly of total allocation)

- \$2,051.00 x .08 - \$164.08/month

\$2051.00
- \$ 164.08 (Fiscal Management Fee)
\$1886.92

4. Alternative Services

- Dorothy plans to use Meals-on-Wheels to provide one meal seven days a week for a total cost of \$100.00 per month (This is for preparation and delivery; Dorothy will pay for food using her income.)
- Dorothy plans to pay a laundry service to do her laundry several times a month for \$60.00

\$1886.92
- \$ 100.00 (Meals-on-Wheels/monthly)
\$1786.92
- \$ 60.00 (Laundry Service/monthly)
\$1726.92

5. Attendant Hours

- Since Dorothy plans to use Meals-on-Wheels for meal preparation and a laundry service to do her laundry, she no longer needs the 7 hours of meal preparation per week, nor the 5 hours for laundry services, reducing attendant hours to 23 hours per week.
- $23 \times 4.33 = 99.59$ (approximately 100 hours per month)
- Dorothy decides to have two attendants, each working approximately 50 hours per month.

6. Attendant Wages and Payroll Deductions

- Taking the allocation, minus the monthly fiscal management and the alternative services fees, Dorothy now knows she has \$1726.92 to pay her attendant's hourly wage and payroll deductions.
- Dorothy decides to pay her attendants the same hourly wage of \$10.00/ hour as their responsibilities are similar.
- $\$11.00 \times 50 \text{ hours} = \$550.00 \times 2 \text{ attendants} = \1100.00

\$1726.92
- \$1100.00 (Monthly Attendant Wages)
\$ 626.92

- Payroll deductions vary, but for initial budgeting purposes assume approximately 10%. **KATCO will provide the actual figure once they process all of the paperwork, and the budget can be adjusted accordingly.**

- $\$550.26 \times .10 = \$55.02 \times 2 \text{ attendants} = \110.04

\$626.92
- \$110.04 (Monthly Payroll Deductions)
\$516.88

7. Worker's Compensation

- Worker's Compensation requires a one-time start-up fee of \$200, no matter how many workers. This amount should be reflected on the Individualized Budget under **E. Possible Remaining Funds**. It will be taken out of savings by KATCO once \$200 has accrued.
- Workers Compensation will be either \$160 or \$350 annually per worker, depending on the number of hours worked.

Let's assume Dorothy's Worker's Compensation fees are \$160 per year per worker

- $\$160 \text{ divided by } 12 \text{ months} = \$13.33 \times 2 \text{ workers} = 26.66/\text{month}$.

\$ 516.88
- \$ 26.66 (Worker's Compensation Monthly Fees)
\$ 490.22

8. Total

- At this point Dorothy's budget is nearly complete. She appears to have a high figure for remaining funds, and may want to consider increasing the hourly wage of the attendant. However, she must take payroll deductions into consideration when she makes a decision about increasing wages.

9. Possible Remaining Funds

- Dorothy would like to use any remaining funds for the following:

- microwave oven to heat pre-prepared or frozen meals;
- cab service during inclement weather;
- vacation hours for her attendants or additional personal assistance service, if needed;
- KATCO will also deduct the Worker's Compensation one time start-up fee of \$200.

10. Approval and Signatures

- Dorothy must sign her Individualized Budget and send it to the *WORK* Program Manager for approval.